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Foreign Agricultural Service

U. S. DEPARTMENT OF AGRICULTURE



Industry and Government  
Cooperation  
In

# FOREIGN AGRICULTURAL MARKET DEVELOPMENT

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A TASK FORCE REPORT TO THE SECRETARY OF AGRICULTURE

## LETTER OF TRANSMITTAL

Dear Mr. Secretary:

As you have indicated, it is of vital importance that our agricultural export program be strengthened and expanded. To this end, we held a meeting on March 2 attended by members of the FAS staff and leaders of the agricultural producer and trade organizations that are currently cooperating with us in foreign market development. At this meeting it was agreed that a joint Government-industry Task Force should study the possibilities for improving market development activities and prepare a report.

The report has been completed and is attached. It briefly sketches the job of developing markets in today's complex world. It also describes in some detail the area of Government-industry cooperation in this field, including steps to improve the activity now being carried out under Section 104(a) of the Agricultural Trade Development and Assistance Act.

On the basis of the Task Force study and the attached report, I recommend for your approval at this time the following policy changes in the cooperative market development program:

1. That the program no longer be considered temporary and as merely an adjunct of Title I, P. L. 480, but that it be made a permanent program. To the extent that foreign currencies are not available, the program should be financed with regular dollar appropriations. This would permit the planning of market development activities in hard money markets on the basis of what needs to be done rather than on the basis of the limited amount of funds we have been able to provide for work in such countries by conversion of foreign currency from Title I countries.
2. That the contribution of Government and farm and industry cooperators to finance market development activities no longer be determined in accordance with a fixed percentage rule applicable to all cases. I recommend that the amount of the trade contribution to be required in each case be determined in the light of all relevant factors, including the potential benefits which can reasonably be expected to accrue to members of the U. S. and foreign industry from exploitation of the particular market. Thus, the cooperator's contribution, in relation to the Government's contribution, would be larger in hard money markets than in soft currency countries. The contribution would be larger in hard money markets where the commodity is liberalized and consumer acceptance established than in those markets where we have only limited access or the commodity is just being introduced. As commercial sales to the market increased, the trade would be expected to assume an increasingly larger share of the program cost.
3. That agreements under which a cooperator organization is to be responsible for the supervision and carrying out of market development activities will be entered into only if the cooperator's U. S. staff is sufficiently financed and competent to back up and supervise the overseas activities including necessary relationships with the Department in Washington and the agricultural attaches and embassies overseas. The level of foreign activity obviously should not exceed this capacity of the cooperator. This would not exclude the carrying out of market development activities under which FAS assumed the responsibility for supervision under a cooperative arrangement providing for a trade or farm organization (not able to do the supervisory job) to assist in carrying out such activities.
4. That it be recognized that in some instances a successful market development effort requires not only work in the foreign market but also specific and directly related work in the United States on such problems as U. S. export standards, and processing, packaging, and labeling to meet export needs. At the present time the expenses of a cooperator in carrying out such necessary work in the United States cannot be counted as part of the cooperator's agreed contribution. I recommend that where work of this type in the U. S. is clearly a necessary component of the overseas market development job, such activities in this country be included in cooperative agreements and the cost applied as part of the cooperator's agreed contribution.

5. That with respect to soft currency countries which do not now buy agricultural commodities for dollars (or do so only to a limited extent) cooperative activities which will contribute to the development of future commercial markets or to the success of the Food for Peace program shall be encouraged at least to the extent that such activities can be financed with non-convertible foreign currencies.

6. That the use of foreign currencies made available by the Government under cooperative agreements be liberalized, particularly the use of currency which has been converted into the hard money markets. I recommend that so long as the cooperator's responsibility for program back-up in the United States and general supervision of overseas activities is met, and so long as the cooperator provides its agreed share of the total financing, the funds contributed by the Government may be spent abroad for any purpose authorized under the project agreement. The expenditures, of course, must be permissible under the laws or regulations of the country whose currency is being used.

The above policy changes have been discussed with the cooperating groups and would be generally acceptable to them. Your approval of these policy changes will make it possible for us to proceed immediately with modifications designed to attain the program improvements found desirable by the Task Force.

I should point out that the Task Force did not probe in depth those areas where Government on the one hand and private trade on the other have separate major responsibility for independent action. That job still remains to be done.

Sincerely yours,

  
John P. Duncan, Jr.  
Assistant Secretary

Attachment

Approved: \_\_\_\_\_



Secretary

May 24, 1961

\_\_\_\_\_  
Date

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### NOTICE

The proposals contained in this report and in the transmittal letter are recommendations. They do not take effect unless and until appropriate changes are made in the regulations of the Foreign Agricultural Service.



# INDUSTRY AND GOVERNMENT COOPERATION IN FOREIGN AGRICULTURAL MARKET DEVELOPMENT

## THE IMPORTANCE OF FOREIGN MARKET DEVELOPMENT

In recent years, United States agricultural exports have undergone a great resurgence in importance. Today exports provide the market for the products of one out of every six cultivated acres in America.

Maintaining and expanding agricultural exports is vital to the prosperity of agriculture and the nation. The value of our agricultural exports in 1960 reached \$4.8 billion and accounted for one-fourth of all U.S. exports. As the nation becomes more mindful of foreign exchange balances, continued recognition is demanded of the role that agricultural exports play in the total economy of the nation.

The significance of this market suggests that we re-examine our attitudes toward agricultural exports. No longer can the United States think of the export market as a minor outlet for its farm products. Nor can we assume that the products will sell themselves. We must approach the maintenance and expansion of these markets with positive vigor and determination.

The United States leads the world in agricultural production. There is no end in sight to our ability to increase our farm output through the efficiency of our farming operations.

But abundant production is not marketing. Our efforts to improve marketing have not begun to keep pace with our production efforts. And foreign marketing activity has lagged even further.

Expanding and maintaining export markets calls for positive actions and attitudes. Passage of the Agricultural Trade Development and Assistance Act of 1954, popularly known as Public Law 480, provided a new tool for joint Government-industry cooperation in this task.

Section 104(a) of that Act provides for the use of foreign currencies "to help develop new markets for U. S. agricultural commodities on a mutually benefiting basis." In the program carried out under that authority, U. S. associations representing producers and processors of agricultural products have played a major role in market development abroad, in cooperation with the Government.

These associations, referred to as cooperators, have also arranged joint market development efforts (projects) with foreign entities including, among others, processors, merchandisers, branches of foreign governments, research institutions and advertising agencies.

Today, there are more than 60 such associations, many of which have been newly organized as a result of this program. They are operating in more than 50 countries. Their efforts are showing up in greater dollar exports of many of our agricultural commodities.

The Task Force believes that this approach to foreign market development under P. L. 480 has proved its value. With greater imagination, effort and resources, it can be made still more valuable.

## THE MAGNITUDE OF THE JOB

Expansion of foreign markets for U. S. farm commodities involves technical, institutional, economic, political, and social considerations reaching from U. S. farms to foreign consumers.

The Task Force members all recognize that:

1. To achieve the full market potential, farmers must generally produce and deliver products of a type and of the quality desired by foreign consumers;
2. It is likewise necessary that handlers maintain and enhance the quality of these products as they pass through the various market channels;
3. U. S. agricultural markets abroad will not expand unless U. S. products are competitively priced;
4. The ability to consistently deliver commodities of the quality and quantity desired is a pronounced asset in the expansion of United States agricultural exports;
5. Elimination or minimizing of trade barriers in all forms is likewise a precondition for the expansion of foreign markets.
6. The market, either existing or potential, must be made aware of and kept informed about the merits of our products.

## The Job at Home

Foreign marketing begins on the U. S. farm. Our export promotion will always be hampered unless we produce commodities of the kind and variety our customers desire. Exports will be hurt if we do not keep our products in top quality throughout the long journey from U. S. farm to overseas consumer. Also, unless our commodities are priced competitively, our promotion may merely develop a market for some other exporting country.

The home side of foreign market development has been neglected too long. Today, U. S. agricultural products are entering two kinds of markets. Whether the transaction is in a "hard" or "soft" money country, the satisfaction of the customer is involved. The United States should long ago have outgrown the rule of "let the



buyer beware." A dissatisfied customer today may mean the loss of a market tomorrow -- perhaps permanently.

In our total concept of foreign markets, there can be no room for "second class" customers. Producers, trade groups and the nation must recognize that product acceptability is a mirror that reflects the "American Image."

Among our specific objectives at home should be the following:

1. Variety, selection and breeding. The production of some farm commodities needs to be directed more at the export market. For such commodities, a comprehensive program of basic research is underway, but more effort is needed to identify and characterize quality factors so plant and animal breeders can re-direct their breeding objectives and methods toward the export market as it does in other major exporting countries.

2. Intensified education program on changes in U. S. marketing needed to meet foreign demand and competition. Greater emphasis should be placed on adapting U. S. products, by package or form, to local marketing and distribution practices in foreign markets and to the patterns of local consumption. Research is needed in all areas to provide this information to producers, the trade and exporters. Labels on containers should be in the local language, giving complete contents.

3. Improved grades and inspection procedures. Many U. S. commodities are sold in export on the basis of U. S. domestic grades. There is a need to develop export grades for some commodities to fit the needs of our foreign customers. A strengthened inspection system may also be needed to perform the necessary grading services.

4. Improvement of U. S. port facilities. There is a great need for better port facilities at many major ports through improved management, modernization or expansion, to facilitate more efficient and proper handling of export commodities, particularly grain. Increased attention should be directed toward maintaining quality and at the same time permitting a greater volume to move through the existing port facilities.

5. An improved distribution system for export commodities. Research and related activities should be devoted to the development of improved facilities for the handling, storage and distribution of the U. S. agricultural products entering world trade. This applies to frozen foods and other perishables entering world markets as well as to non-perishable commodities.

6. Continuous study of U. S. export pricing to assure competitive prices. This should include domestic prices at country points, terminals and export markets and the level of Government export payments where applicable. For many commodities, prices of competitors in major foreign markets could be made available to the domestic trade on a regular basis.

## The Job Overseas

Conditions for raising consumption levels and living standards around the

world are more favorable today than ever before. Incomes are rising and are reflected in foreign import purchasing power.

The developed "hard currency" countries of the world -- such as Japan and most of Western Europe -- are busy and prosperous. Their exports are booming and they have greatly improved their dollar exchange and gold reserve position. Their products enjoy wide sales in the United States and elsewhere, generating purchasing power.

Developed countries account for most of our dollar business. In fiscal year 1960, the developed market accounted for \$2.3 billion of U. S. dollar exports. That was 73 percent of our dollar sales and 52 percent of our total agricultural exports for the year.

In some underdeveloped "soft currency" countries, dollar trade prospects are largely in the future. Many of these countries tend to be short on industry and long on population. The American farm products they receive at this time reach them chiefly through the special programs, such as sales for foreign currencies, barter and donations.

But many of these underdeveloped areas are beginning to advance economically. They are trying desperately to industrialize and are making progress. Moreover, there is growing recognition in these areas of the need for better diets and improved nutrition.

Making the most of our market opportunities requires action abroad in many areas, chief of which are:

1. Information and intelligence. Expansion, or even maintenance, of foreign markets is possible only with comprehensive information about world developments that affect agricultural trade. Markets must be analyzed, competition appraised, price supply and demand information kept current and many other intelligence services provided. In this vital overseas job, with its many facets, both the Government and private trade -- through individual firms and through trade associations -- have major roles.

2. Trade liberalization. Trade barriers, including exchange controls and other government regulations, constitute one of the major problems faced by most commodity groups. A basic objective in the development of markets is to secure the reduction or removal of such barriers. This is primarily the responsibility of Government, but important contributions can be and have been made by trade and producer groups.

3. Promotion. Virtually all of the various market promotion techniques employed in the United States may also be used abroad. These include such activities as informational programs on product quality and new uses among importers and processors; advertising campaigns; establishing new merchandising methods; training retail sales personnel; special sales campaigns; and making effective use of the public press, magazines, radio, television and visual aids in sales promotion programs. Activities of this nature are carried on by private firms and associations with varying degrees of Government cooperation and assistance.

4. Marketing assistance. Marketing assistance, as distinguished from promotion, involves overseas work by U. S. industry and Government personnel to improve the storage, handling, transportation and distribution of the product. In under-developed countries where market promotion is geared closely to sales under P. L. 480, marketing assistance may represent the major type of activity.

5. Trade relations. There is a continuing public relations and education job with importers, processors and distributors of U. S. products concerning such matters as the sales points of U. S. products, our grades and qualities and how to obtain our products. A key aspect of this public relations job is handling trade complaints, and in this field trade associations, individual firms and governments have important responsibilities. This work needs to be strengthened.

6. Introduction of new commodities. This may involve pilot projects and demonstrations and also in some cases the supplying of introductory quantities of commodities. Although new product introduction is primarily a trade job, the Government should take a more aggressive role in it than it has in the past, particularly in market analyses that measure the prospects and costs of such development.

## COOPERATIVE MARKET DEVELOPMENT ACTIVITIES ABROAD (A Review of Operations with Recommendations)

The Task Force believes that the maximum effort must be made to increase exports of U. S. agricultural products on a sound basis and that jointly financed Government-industry market development activities are an essential part of that effort.

The strengthening of this program requires that the legislative mandate be kept in mind, sound principles evolved from six years' experience be observed and recommendations designed to improve and streamline operating policies be implemented.

Two basic authorities exist for this program: The Agricultural Act of 1954 and the Agricultural Trade Development and Assistance Act of 1954. The first Act directed the Secretary of Agriculture to encourage and promote the marketing of U. S. agricultural commodities abroad as deemed necessary, including assisting farmers, processors, distributors and exporters to adjust their operations and practices to meet world conditions. The cooperative program has been carried out to date under the second authority, which provided that foreign currencies accruing from Title I sales for foreign currencies under that Act be used to help develop new markets for U. S. agricultural commodities on a mutually benefiting basis.

The intent of Congress is indicated by reports of both Houses in 1959 on the extension of Public Law 480. The Senate report affirmed ". . . trade expansion as a policy of Congress . . ." and said that "a stated objective of this policy" was ". . . to stimulate and facilitate the expansion of trade in agricultural commodities produced in the United States . . ." The report further indicated that: "It was and is the intention of Congress that foreign currencies be used to the maximum extent possible for agricultural market development and that first priority be given this use." The House report stated that: ". . . the bill is designed to make certain that greater emphasis will be given to the development of new and expanded markets for



U. S. agricultural products -- one of the major objectives of the Act -- both in hard currencies and in underdeveloped areas."

Sound principles that have been developed by experience should be the foundation for the future program. Market development opportunities are generally in excess of total resources available or which may reasonably be expected to become available. The major role in market development is played and should continue to be played by private firms who profit directly from the exploitation of such opportunities. There remains a role for nonprofit trade and agricultural groups in exploiting market development opportunities in those areas where individual firms are neither immediately nor directly concerned nor equipped to do the job. The Government should aid in the market development efforts of such groups where resources are lacking. Government assistance has been provided to such groups under cooperative arrangements and should be continued where necessary for sound programs abroad.

For this program to achieve effective results, cooperating groups must assume supervisory and operational responsibility for foreign operations and insure the effectiveness of such operations. Cooperators must provide resources and program support to the maximum extent possible through the membership of such cooperating groups benefiting from these efforts and wherever possible, through third parties abroad having a direct interest in and benefiting from market development efforts. Since it has been recognized that the promotion job rests primarily on the trade, it is axiomatic that the cooperative program can be neither justified nor successful without full cooperator support.

Using these guides, the Task Force has reviewed operating policies and arrived at recommendations designed to strengthen and improve the effectiveness of this program. The recommendations which follow are a result of this review and should be considered for implementation.

***1. MAKE PROGRAM PERMANENT: The Task Force recommends that the cooperative Government-industry foreign agricultural market development program be made permanent.***

The basic authority used for this program to date has been Section 104(a) of Public Law 480, the Agricultural Trade Development and Assistance Act of 1954. This statute is subject to periodic renewals.

The program has proven its effectiveness, and a permanent basis for it is highly desirable. Experience has shown that the job is a continuing one and that sustained effort is necessary to obtain maximum results. The assurance of permanence is needed for long-range planning and more effective personnel recruitment.

The Task Force considers that local currencies accruing under Title I of P. L. 480 should be used for foreign market development to the maximum extent possible, including conversion of soft currencies into hard currencies whenever feasible. Since it is desirable that the market development program be made permanent, the Task Force recommends that to the extent that P. L. 480 currencies are insufficient to finance the program at the desired level, regular dollar appropriations be provided.

**2. EXPAND ACTIVITY IN DOLLAR AREAS: *The Task Force recommends an expanded program, with priority being given to countries and commodities that offer greatest promise of expanding dollar exports.***

Activity to date has been limited to countries where FAS had 104(a) currency, either as payment for Title I commodities or as the result of conversion from Title I countries. Activity in the hard money markets, which are not eligible for Title I sales programs, has been dependent on the limited conversion of 104(a) funds provided for in Title I agreements with soft currency countries. The program in hard currency countries needs to be freed from complete dependence on conversion. The guiding factors in determining the size of the program in these countries should be the size of the job to be done. If funds obtained by conversion are insufficient for this job, the need should be met by dollar appropriations and/or increased expenditures by cooperators.

**3. MEET THE NEEDS IN SOFT CURRENCY AREAS: *The Task Force recommends that cooperative programs be assigned an important role in selected underdeveloped countries, particularly those importing agricultural products under U.S. Government programs.***

There is a growing recognition of the need to improve the diets of the world's hungry. FAO's Freedom from Hunger campaign and our own Food for Peace program are examples of the concern felt for this problem. As these aspirations are reflected in tangible results, new markets will be opened for many new products.

In countries receiving U. S. commodities under Government programs, co-operators need to help assure acceptability of the products. This frequently includes technical assistance in how to buy the product and, for products requiring additional processing, information on such processing.

Where consumer education is needed, the job may include assistance in pilot operations to demonstrate how this may be achieved. Technical assistance in the development of school lunch programs has a place. Many of the developing countries are in process of moving toward dollar markets and market development programs can sometimes be helpful in this transition.

**4. BROADEN THE USE OF FOREIGN CURRENCY: *The Task Force recommends broader authorization for use of foreign currencies by cooperators so as to release industry dollars for use in supervising and servicing program expansion.***

Many cooperators find the availability of dollar resources a limiting factor in supporting work for expanded market development activities. As programs expand, dollar requirements for supervisory personnel and administration are increased both from the standpoint of the foreign programs and supporting domestic activities.

For those cooperators with sizeable and expanding programs, who are contributing to projects in accordance with established criteria, wider authorization to use foreign currency would help with this problem. To the extent that foreign



laws and Public Law 480 sales agreements permit, such foreign currency uses could include payment of travel expenses of foreign trade teams to and in the United States, salaries of consultants abroad, market development specialists and technical personnel abroad and reimbursement for per diem of cooperator representatives stationed abroad while on consultation in the United States.

**5. STRENGTHEN COOPERATOR RESOURCES:** *The Task Force recommends that cooperator organizations be significantly strengthened in order to carry out effectively the larger program recommended.*

A major promotion job requires a cooperator that is strong, well organized and well-financed. It needs assurance of continuing financing within its industry and should be in position to obtain from industry the services of skilled technical and administrative manpower. It should have such liaison with and support from individual firms as to assure followup necessary to convert education and promotion into actual sales.

Moreover, a foreign market promotion organization can be no stronger than its staff. Personnel must be carefully selected and trained to assure acceptance by the people with whom they must work in a market development program.

**6. ASSURE COOPERATORS LONGER-TERM FINANCING:** *The Task Force recommends that established market development projects be planned, budgeted and financed on a selective basis, for periods of up to 5 years in advance and that funds be appropriated by the Congress to permit the changeover to a 5-year basis.*

Present regulations provide for contractual arrangements with cooperators for periods up to three years if the programs have been in operation for at least two years and have proven their value. It will strengthen the program if this is changed so that programs which have demonstrated their effectiveness can be covered by agreements for 5-year periods with provision for extension during the third year.

Short-term authorizations make it difficult to plan effectively and to recruit and retain competent personnel. It is difficult for foreign cooperators to obtain financing unless the U.S. contribution is assured for a significant period.

If cooperators can enter into agreements with the Government on a basis which indicates reasonable permanency, it will permit effective planning and will provide the job security which personnel desire. Under such circumstances, it would be possible to develop and operate better programs, and maximum benefits would accrue to American agriculture.

Where a three-year agreement is used, the Task Force recommends that it be renewed annually; where a four-year agreement is used, renewal should be biennial.

**7. PROVIDE AMPLE GOVERNMENT RESOURCES:** *The Task Force recommends that the Foreign Agricultural Service be strengthened, both abroad and at home, to support this program more effectively.*

In countries where market development is a major activity it is especially desirable that personnel assigned as agricultural attaches have training and experience in marketing. Additional in-service training in this field should be provided for attaches.

In addition, the present resources of attache offices need to be surveyed carefully to assure that sufficient additional funds and facilities are made available to service the growing market development program properly.

The Task Force also recommends that the commodity divisions of FAS and other appropriate units engaged in market development work be adequately staffed so that the program can be properly planned, supervised, carried out and audited. The addition of specialists in such fields as market research, sales promotion and nutrition would be helpful. Some cooperators have indicated a need for additional FAS assistance in the fiscal field.

- 8. START PROGRAMS WITH ACCURATE, DOCUMENTED MARKET ANALYSIS:** *The Task Force recommends that more attention be given to the importance of obtaining an accurate and documented analysis of the market situation in a country as a basis for each major market development program.*

Before a major market development program is undertaken, it should be definitely established that there is a market for the commodity concerned within the country under consideration or that such a market can be developed. Market research is also needed to guide promotional activities. This requires a study of the market situation in the area by competent technicians, either staff members or trained private personnel.

- 9. STREAMLINE ADMINISTRATIVE PROCEDURES:** *The Task Force recommends that immediate efforts be devoted to streamlining the administrative procedures of the program.*

The Task Force reviewed in detail the administrative operations of the program in such fields as project development and amendment, travel by cooperator personnel, establishment of field offices, submission of reports, fiscal administration and auditing. Detailed recommendations on these matters are being submitted in a separate report.

- 10. IMPROVE MEASUREMENT OF RESULTS:** *The Task Force recommends that program and project evaluation take place at two levels:*

- a. Internal project evaluation by the cooperator and the Government on a continuing basis, including an annual audit by the Foreign Agricultural Service, and*
- b. Periodic program evaluation on a country or commodity basis by independent specialists drawn from Government educational and research institutions and business.*

The difficulties in objectively measuring results in market development work are recognized. Nevertheless, evaluation and appraisal are an essential part of the job. The fact that a particular activity has apparently been effective in the past is not necessarily justification for its continuance.

**11. EXPLORE NEW MARKET DEVELOPMENT TECHNIQUES: *The Task Force urges that imagination and ingenuity be exercised continuously to devise new market development techniques.***

A wide variety of activities has been carried out under Section 104(a). Some of the most common have been advertising, product demonstrations and exhibits, public relations, information and education campaigns, and sales training. The rendering of technical assistance in handling U. S. products and the exchange of industry teams have been among the most successful.

For some commodities, the market development effort is to promote a U. S. product directly. For others, the program seeks to build U. S. exports indirectly by increasing the quantity used.

The Task Force endorses the types of activity carried out by cooperators to date and recognizes a continuing need for imaginative new techniques.

**12. KEEP ALERT TO OTHER NATIONS' PROGRAMS: *The Task Force recommends that possibilities be investigated for cooperation in certain international agricultural market development activities.***

International market development is a big and growing field. Denmark, Australia, Canada and many others are well known for their promotion of agricultural products. We must be prepared to compete with such efforts.

However, there is the possibility in some cases of cooperating with other governments of foreign producer groups in joint market development. Already there are numerous examples of international cooperation in market development, of which the Pan American Coffee Bureau and the International Wool Publicity and Research Fund are among the best known.

Where the objective of such programs is to expand the total world demand for a commodity, regardless of country of origin, the United States might benefit by cooperating. The procedure for such cooperation would have to be flexible since the U.S. Government funds would probably have to be commingled with those of foreign organizations.

Attention should also be given to the fiber programs and nutritional and related activities of intergovernmental organizations such as FAO, UNICEF, and WHO which have market development implications for U.S. commodities so that appropriate followup can be considered.

**13. REEXAMINE GOVERNMENT-INDUSTRY COST SHARING: *The Task Force recommends a reexamination of the basis for allocating cost of market development work between Government and cooperating groups.***



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So that sound market development work will not be impeded, considered judgment should determine the sharing of costs, rather than rigid formulas.

The Task Force recognizes that FAS must use criteria in establishing the ratio of FAS and cooperator contributions. These criteria should take into consideration the situation governing the commodity to be promoted, whether the commodity is processed or unprocessed, the country or market in which it is to be promoted, the types of activities to be carried out, how the cooperator's industry is organized and its resources, both present and potential.



## TASK FORCE COMPOSITION

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